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OPENING INTERNATIONAL PATHWAYS

Opening International Pathways: An Analysis of the Internationalization Rationales for
Developing '2+2'-style Vertical Articulation Agreements with Global Institutions

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Abstract

The University of Ontario Institute of Technology (UOIT) has a legislated mandate to create college-to-university transfer pathways, and a strategic plan which sets out expectations to internationalize the university. While UOIT has a well-developed set of pathways from Ontario colleges, UOIT has only recently joined other Ontario universities in creating '2+2'-style pathway or articulation agreements with international institutions. The models for these agreements are numerous (2+2, 3+1+1, etc.), with any number of possible permutations. The rationales for these arrangements are also numerous, and vary based on type and direction of the arrangement, the context of the home institution and home country, and the priorities of the receiving Ontario university, amongst other factors.

This paper explores those rationales and analyzes them within the context of the broader internationalization of higher education, with a particular focus on the possibility of college-to-university transfer pathways across borders. This paper will situate the development of international college-to-university transfer pathways within both the literature on international education and the literature on post-secondary transferability, identify key unresolved issues for understanding these specific types of international pathways, and further explore the possible benefits of this “niche” pathway approach for UOIT’s burgeoning internationalization efforts.

Keywords: college, university, transfer, pathways, 2+2, international, rational, analysis, articulation agreements

Opening International Pathways: An Analysis of the Internationalization Rationales for Developing '2+2'-style Vertical Articulation Agreements with Global Institutions

The University of Ontario Institute of Technology (UOIT) has a legislated mandate to create college-to-university transfer pathways, and a strategic plan which sets out expectations to internationalize the university. While UOIT has a well-developed set of pathways from Ontario colleges, UOIT has only recently joined other Ontario universities in creating '2+2'-style pathway or articulation agreements with international institutions. The models for these agreements are numerous (2+2, 3+1+1, etc.), with any number of possible permutations. The rationales for these arrangements are also numerous, and vary based on type and direction of the arrangement, the context of the home institution and home country, and the priorities of the receiving Ontario university, amongst other factors.

This paper explores those rationales and analyzes them within the context of the broader internationalization of higher education, with a particular focus on the possibility of college-to-university, or “vertical” (Lang, 2008) transfer pathways across borders. Within Ontario, the expected outcomes for college-to-university pathways include increased flexibility and improved access (Kerr, McCloy & Liu, 2010), and there is a growing body of work on the impact of these pathways. However, there is little research available on international pathways, and the “student-centric” approach to domestic pathway design is not apparent as the rationale for these international pathways; rather, the interests of receiving institutions and sending countries seem to prevail. What’s more, international mobility of students to study at Ontario universities mirrors the socioeconomic inequalities amongst and within countries – in contrast with the implied intent of college-university pathways to broaden access and diminish socio-economic inequalities. This paper will situate the development of international college-to-university

transfer pathways within both the literature on international education and the literature on post-secondary transferability, identify key unresolved issues for understanding these specific types of international pathways, and further explore the possible benefits of this “niche” pathway approach for UOIT’s burgeoning internationalization efforts.

The specific issue of international degree completion transfer pathways (2+2, x+y, etc.) is but one within the ever-expanding cosmos known as the “internationalization of higher education” or simply referred to as “international education”. These terms refer both to educational practices and activities that cross borders, cultures, and languages, but also to the concept, and growing academic study of the internationalization of higher education. Within this broader issue, which includes international research collaboration, internationalization of curriculum, and other aspects, international degree completion transfer pathways fit within the sub-set of international student mobility.

In terms of activity levels, international student mobility has expanded in step with the globalization of the world economy over the past 25 years. Just under 5 million post-secondary students are currently studying outside their country of citizenship, nearly quadruple the number in 1990 (1.3 million students) (OECD Education at a Glance, 2014). The Canadian Bureau for International Education expects that number to rise past 7 million by 2022 (CBIE, 2015). The movement of students around the globe represents an important aspect of the global economy, in terms of trade in (educational) services, but more importantly in terms of the development of human capital and the mobility of labour. As countries like the “BRICs” emerge, and the size of the global middle class grows, so too does the global demand for higher education. One consulting firm projects that growth is “expanding the overall market for educational products and services by nearly 50 percent from \$4.4 trillion in 2012 to \$6.2 trillion by 2017.” (Kramer et

al., 2014). The United States, the largest recipient of international students, has seen similar growth. Over the past 15 years, the flow of international students has doubled, to just over one million students enrolled in 2015/16 (Institute of International Education, 2016). An analysis of economic impact showed that those international students contributed \$33 billion to the US economy, supporting over 400,000 jobs during the 2015-2016 academic year (NAFSA, 2016).

In Canada, the story is similar. International students are big business and, perhaps more importantly, are expected to make up for declining domestic enrollments. A report commissioned by the federal government estimates that for 2010, “international students in Canada spent in excess of \$7.7 billion on tuition, accommodation and discretionary spending; created over 81,000 jobs; and generated more than \$445 million in government revenue” (Kunin, 2012). Growth rates in Canada have mirrored global trends, and are expected to continue that trajectory. According to a panel of experts convened by the federal government to advise on the way forward, “Canada's International Education Strategy should seek to double the number of full-time international students, from 239,131 in 2011 to more than 450,000 by 2022” (Advisory Panel on Canada’s International Education Strategy, 2012).

While there are other aspects of internationalization of higher education, as noted earlier, the greatest emphasis and effort tends to focus on what is often referred to as “cross-border” education (Knight, 2005), as a key revenue generator and/or revenue replacement for institutions. In a recent survey of all Canadian Universities (which received an 80% response rate), 45% of institutions identified undergraduate international recruitment as the institution’s top international priority (international strategic partnerships were a distant second at 19%). Interestingly, transfer pathways sit between those top two priorities, as they are both a tool for student recruitment, but also a means to and/or result of strategic partnerships. In that same

survey, 63% of respondents offer a double degree, 45% offer a joint collaborative degree, and 78% offer one of those options (whereas only 48% reported doing so eight years earlier, in the 2006 version of the study) (Universities Canada, 2014).

It is important to clearly understand the above nomenclature, understand how these international collaborations relate to domestic degree completion pathways, and also consider where they all sit on a spectrum of collaboration for transfer of credits and curriculum design.

An international undergraduate double degree is typically an x+y transfer scenario, where a student completes a portion (usually half) of a program at the sending institution, and then transfers to the receiving institution, receiving a block transfer for the credits completed. Upon completion of the other portion of the program at the receiving institution, the student graduates with the degree of the receiving institution, and also with the degree of the sending institution, which recognizes the latter portion of the program as transfer credit back to the sending institution. In this instance, the student receives two degrees on two parchments. The curricula of the two degree programs exist independent of each other, with a transfer credit articulation agreement setting out the conditions for the student's transfer to the receiving institution and then the transfer back of credits for the granting of the degree from the sending institution.

In a joint collaborative degree, the second option referred to in the Universities Canada survey, the student enters a co-designed program which sets out a joint curricula spanning both institutions. The program will include credits from both institutions, and upon graduation, the student will receive one degree jointly granted by both institutions. This type of collaboration requires much more coordination and program design efforts between the partners.

It is useful to understand these types of undergraduate degree-granting arrangements along a spectrum of inter-institutional collaboration (See Figure A). This collaboration ranges

from no collaboration, where an individual student applies independently to carry credits into another degree program at a different institution, to high levels of collaboration (and dedication) which would include joint curricula design, academic approval and quality assurance processes, and joint granting of degrees. This spectrum, as articulated, doesn't take into account undergraduate-to-graduate style transfer pathways, nor does it clearly account for the differences between university-to-university transfers versus those between technical/vocational/junior colleges and universities (also known as horizontal versus vertical transfers (Lang, 2008)).

It is those “college-to-university” transfers pathways, as they are known in Ontario, that present an interesting opportunity to institutions interested in developing double-degree, x+y transfer pathways. Of the existing double degree pathways between Canadian and international institutions, many are university to university degree completion transfer pathways for completion of a degree in Canada, with the student also receiving a degree from the home institution. The students leave the home institution before completing a degree program (but, in the case of the double degree, receive the home degree eventually). The domestic vertical model is not mirrored internationally. There are, however, exceptions. A good example are the articulations between Ontario Colleges and Irish Institutes of Technology, where a Canadian student can complete a college diploma, and then transfer to an Irish institution to complete a bachelor (3-year) degree with an extra year of study. A key question for the discussion is this: Can “college-to-university” (or lower-to-upper undergraduate, or vertical) transfer pathways succeed internationally, and do they make sense for both students and institutions? First, we must review what we know about the success of and rationales for such pathways at the domestic level.

The literature on “college-to-university” transfers is extensive in Canada (Lang, 2008; Martinello & Stewart, 2015; etc.) and the United States (Stern, 2016; O’Meara, Hall, & Carmichael, 2007; etc.). Aspects of the literature include: the level of system coordination to allow for and encourage these transfers, the development of coordinating structures for articulation, comparative analyses across jurisdictions, and the impact of these pathways on student success, graduation rates, labour market outcomes, and social inequalities.

The rationales for these arrangements are multiple, overlapping and in some cases at odds with each other. From a system perspective, transfer pathways can make for a more efficient post-secondary system, with fewer credits lost in transfer, as well as greater alignment of academic programs through the sharing of curricula via the articulation process. From the public funder’s perspective, transfer pathways for bachelor degree completion are, at least in theory, less expensive for a straightforward degree completion pathway, and certainly less expensive than funding a full degree program and a full diploma or associate degree program. From the receiving institution’s perspective, the transfer represents higher enrollment, and possibly enrollment from a segment of the public (first generation, low-income, indigenous, etc.) who have not historically accessed bachelor degree programs. From the originating institution, under this pathway, the institution does not lose any students (as they complete their diploma or associate degree) and gains the ability to position themselves as a stepping stone to a full bachelor degree. Finally, and ideally most importantly, from the student’s perspective, there are several advantages: the flexibility to move from college to university, including after or during a period of employment; the ability for students unable to directly enter university (due to low grades or lack of prerequisite credits) to reach university via transfer; and the potential improvements to career development and earnings potential with the double credential.

When we consider college-to-university, vertical transfer pathways at an international level, these considerations shift considerably. Some observers of domestic, intra-jurisdictional articulations have identified lack of coordination of these transfers as a major barrier. In the US, despite 100 years of experience in some state systems, that articulation experience has been called a “work in progress” (O’Meara, Hall & Carmichael, 2007). In Ontario, we lament a binary system and point to provinces like British Columbia as a standard for transferability (Kerr, McCloy & Liu, 2010). However, at the international level, there is no system to speak of. That said, one of the systemic benefits of increased articulations at the domestic level, that of increased consistency (or, at least, cross-pollination) of academic programs, through the sharing and mutual review of curricula, can also be of benefit at an international level. As academics share and review program curricula across borders, in order to develop articulations, the general knowledge of how certain academic fields are taught in other countries increases, and that benefit can accrue on both ends of the articulation.

The funding or governmental perspective on these articulations at an international level must be split between sending and receiving countries. On the receiving end, these transfers can represent marginal increases in enrollment, and so will be viewed favorably. The value of the transfer pathway for the sending country and/or jurisdiction depends on a variety of factors, both economic and political. For certain countries, these 2+2 agreements are a matter of supply and demand. China is a leader in the development of these agreements, mostly as university-to-university double degrees, as the sheer volume of demand for higher education outstrips the supply (although the supply too is expanding rapidly) and is a primary driver of Chinese efforts to develop these relationships. Considering which side of an articulation (sender or recipient) initiates an articulation discussion, it is almost exclusively Chinese institutions which approach

UOIT for these types of arrangements. For other countries, sending students on a horizontal or vertical transfer can be contentious, particularly if we are looking at transfers from the Global South to Western countries like Canada or the US. The “pitch” to develop a transfer pathway may be interpreted as an implication that degree completion in the home country is undesirable, or that the Western degree is inherently more valuable. The issue of brain drain is a concern, especially if the home institution’s efforts in education and training are perceived of as part of the national development project of that country. Furthermore, some countries have public funding schemes for post-secondary education which require students receiving essentially free public education to stay in the country upon graduation. As an example, UOIT’s recent discussions with a potential transfer partner in the Caribbean fell apart due to concerns that the students would not comply with government policy if they were to complete an associate degree and then transfer out of the country.

The participating institutions may gain any number of advantages from entering into these arrangements. An obvious gain for the receiving institution are the students themselves; however, depending on the scale and scope of these pathways, student recruitment may not be the primary interest, or of any interest, for the receiving institution. In some cases, the pathway is for a full cohort of students, and requires significant planning and coordination with the partner in the home country, and also provides significant revenues to the receiving institution. Other articulations provide for small flows of students, but help establish or cement a relationship, particularly if the pathway is in an academic area tied to on-going research or teaching collaborations. A pathway agreement may also be a means to establishing a name or reputation in the home country – this is certainly of relevance to UOIT as it explores pathway agreements in countries that have been identified as important for overall international student recruitment. For

the sending institution, one key advantage is similar to the advantages of domestic pathways – the ability to promote the pathway to the partner’s degree program as a feature of the home institution’s programs. This works particularly well in a college-to-university transfer system where the completion of the college diploma is generally the terminal point for programs within a college / junior undergraduate institution, and thus the transfer to a university holds no negatives for the sending institution. However, internationally, each national system contains its own peculiarities, and the vertical transfer is blurred. Some systems will offer both the lower and upper level undergraduate degree within the same institution, and thus a pathway out of the institution may be perceived as cannibalizing enrollment. The exploration of international pathway agreements, by any institution, quickly becomes first the exploration and drive to understand the particular context of a proposed home institution and home country.

Here we arrive at the array of possible perspectives of a potential student considering an international pathway, with particular focus on a vertical, college-to-university transfer. In the domestic pathway literature, the motivations and success of these students have been studied extensively, such as the role of student choice in a binary (college and university) system (Lang, 2008), or the effect of articulated transfer pathways on degree completion (Stern, 2016). Increased access to university education via an articulated pathway for students from low-income families has also been widely explored. (Jones & Field, 2013; Christie, Cree, Hounsell, McCune & Tett, 2006). For international students considering a transfer pathway, there are three key intersecting areas to explore: value of the transnational education, the immigration effect, and the questions around cost, access, and inequality.

Domestically, the pathways question for the student is, essentially, whether to complete a bachelor’s degree after college, or not. One study of Ontario student choice before entering post-

secondary education (Lang, 2008) indicated that most students with the choice to go to either type of institution (an Ontario college or university) do not take articulated pathways into account when making a decision, the implication being that the possibility for university-eligible students to choose between only university or college and university is not particularly relevant to students as they complete their secondary education and make their post-secondary plans. Domestically, there are of course several barriers that will restrict that choice, including grades, costs, financial constraints, and socio-cultural expectations, amongst others. Internationally, the related choice for most existing bachelor degree articulations, which are university-to-university, will be whether to complete the bachelor degree in the home country or internationally (with multiple barriers and incentives affecting that choice). Interestingly, for a vertical international pathway, where the student has completed a diploma/assoc. degree, the student will have the choice to complete the bachelor degree internationally, but may not have the choice to complete the same degree domestically, in countries with little-to-no vertical transferability.

If the choice to take the international pathways can be taken, one likely advantage for the student is the value of a transnational education, both in the intrinsic value of an education across systems and cultures, and also for entry into the labour market. This would be the case for either vertical or horizontal transfers. The acquisition of true fluency in the language of the receiving institution can be a related benefit. Having an educational background from two countries should be an advantage if the student plans to work in both countries over his or her career, and can be an advantage if the student works in only one of the countries (depending on the perception within that country of the other country's educational system or economy in general). Perceptions here are important: there will certainly be countries and cultures where those that can afford the cost of the international completion of the transfer will a) prefer the completely

international degree (versus a transnational double degree), and b) in the case of the vertical transfer option, not seriously consider a lower-undergraduate, or technical/vocational option. These perception issues need to be considered within the broader issues of access and inequality.

Before arriving at that broader issue, which is central to the viability of international vertical transfers, let us take a moment to consider another key factor in the student's decision-making process: the immigration implications of transfer. Of course, the ability to permanently stay in a host country after graduation is a consideration for international student mobility in general. Significant portions of international students go on to stay as temporary workers, and eventually transition to permanent residents, and then citizens. In a study of OECD countries, Canada had the highest rate of international students staying in the country upon graduation, at 33%. (OECD, 2011). A recent government of Canada study reports for international students, one-third of those receiving a bachelor degree, and one-half of those receiving a graduate degree become permanent residents within 10 years of graduation from a Canadian institution (Lu & Hou, 2015).

There is no doubt that for some international students selecting Canada, the chance to immigrate is an important factor in the decision. The existence of a vertical or horizontal transfer can open the immigration door in the same way a full four-year program can. In most provinces of Canada, a full-time, 2-year post-secondary program is the minimum requirement to put oneself on the path to permanency. In Ontario, the international student recruitment pattern for the two largest markets, China and India, is indicative of how the immigration opportunity can be a pull-factor. For the 2015-16 year, Chinese students represented 70% of all international students at Ontario universities, while Indian students represented 10% of such students (and only 5% of international undergraduate students) (MAESD, 2016). During the same year, Indian

students represented 58% of international students at Ontario colleges, with Chinese students in second place at 28%. The difference for the Indian market is staggering – 58% for Ontario colleges and only 5% for undergraduates at Ontario universities. One research group (Illuminate Consulting Group, 2014) has specifically identified this pattern as the result of students (and families) in the Indian market making “college vs. university” decisions based on an interest in immigration to Canada, with colleges as the shorter and less expensive route than a bachelor’s or even Master’s degree. In fact, staff from Ontario college international offices anecdotally report that many incoming international students pursuing a college diploma have already completed a bachelor degree in their home country. Noting this, it would be possible then to leverage this pull factor for the development and promotion of transfer pathways. However, the above noted concerns around brain drain may lead to hesitation for sending country institutions to create transfer pathways predicated as immigration pathways.

The last factor affecting a student’s perspective that this paper will consider is, as noted earlier, the intersection of cost, access and inequality. Whether an international student is considering a full or transfer program, a diploma or degree, one thing is clear: that education is expensive. International students in many countries, and most Western countries, pay higher, differential fees. At UOIT, most undergraduate international students pay triple the tuition of a domestic student. At Durham College, the institution with which UOIT is co-located, international students pay about 4 times the domestic tuition (although this varies depending on program). At the University of Toronto, the most expensive Ontario university, international Arts and Science students pay seven times what a domestic student would pay. Despite this, Canada is a relative bargain compared to the US or UK.

So, despite those costs, the overall movement of students across borders to complete a degree outside one's home country has greatly increased over the past decades, and that trend will continue. The greatest flow of those students is from the developing/emerging-market countries, such as China and India, into Western countries, most notably the USA, UK, and Australia. More students are coming from lower-income countries, but paying very high prices. The math here is obvious: it is generally the wealthy, or in some cases nationally-sponsored, who are making up the vast majority of this mobility. This comes as no surprise, and is simply part of the equation for each institution's recruitment efforts.

Now, one of the key policy drivers of domestic transferability is access. The idea of allowing students to complete a diploma/assoc. degree and then transfer to university allows for, in theory, an absolute increase in university graduates but, more importantly, a relative increase in the share of university students from backgrounds that have historically accessed universities at very low levels, such as students from low-income families, from indigenous families, with disabilities, or those who are entering from a family without a history of post-secondary education completion ("first-generation"). In a sense, a domestic system with progressive public financing and transferability, like the Ontario system, is designed to create upward social mobility and decrease the effects of economic inequalities. The global flow of students from the Global South to Western countries is certainly not designed to combat in-country or inter-country inequalities.

Even if a vertical international pathway were conceived of as a countervailing force to economic inequality, it would most likely not be economically viable. The students most likely to access lower-cost, technical/vocational programs are the same who would not be able to afford those significantly higher international fees (and likely higher costs of living, and travel costs,

etc.). This has been the experience of UOIT in discussions with representatives of Latin American technical/vocational colleges: a strong belief that such a transfer scheme would be wholly unviable for their student population.

There may be one “silver lining” on the question of whether an international transfer pathway, vertical or horizontal, can address the access issue. The opportunity to transfer after completing a diploma, associate degree, or first two years of a bachelor’s degree in a home country can, in many cases, represent a significant cost savings to a student over the cost of a full degree, especially when the student is coming from a country with low, or even no tuition fees. A student or family in an income bracket or with access to credit that would not quite allow for a full four-year degree, but with a strong interest in having an international education, may be able to access that opportunity through such a transfer arrangement.

Unpacking these articulated pathways is complex, as there are multiple, over-lapping motivations for their promotion by governments or institutions, their creation between institutions, and their pursuit by individual students. As UOIT embarks to develop international articulation agreements, with hopes of mirroring its approach domestically, there are many challenges, both in the creation of functional, viable transfer pathways, but also in order to ensure that any pathways developed fit within its broader internationalization efforts and are a balanced part of its international relations. There is certainly room for conflicting internationalization rationales to push at each other when an institution, such as UOIT, engages with another international partner to explore academic collaboration and recruitment interests simultaneously. One author in the internationalization of higher education field would characterize this as the conflict of the instrumentalist and idealist ideologies that drive each institution’s international efforts (Stier, 2010). At the very least, a responsible institution must

take into account these considerations as more and more of these articulated transfer pathways are negotiated with international partners.

Appendix A

| | | | | | | |
|--|---|--|---|-----------------------|-----------------------|--------------|
| Individual student transfers without any formal agreement | Transfer credit articulation agreement, from a to b | One-way lower degree (diploma, assoc. degree) pathway transfer for degree completion | Two-way Transfer credit articulation agreement, from a to b and from b to a | One-way Double degree | Two-way Double degree | Joint degree |
| <div>Low</div> <div>Level of Collaboration</div> <div>High</div> | | | | | | |

Figure A. Spectrum of collaboration for credit transfer arrangements.

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